Massachusetts Department of Housing and Community Development

Community Development Block Grant Program

dhcd Massachusetts

Deval Patrick, Governor

Greg Bialecki, Secretary

Aaron Gornstein, Undersecretary

Application Training for:

Community Development Fund I

Community Development Fund II

Mini-Entitlements

Agenda

- Overview
- Application
- Community Development Strategy
- Thresholds/National Objective
- Project/program application packets
- Evaluation
- On-Line Application Form
- Q and A

Eligible Applicants

Municipalities under 50,000 **and**

Municipalities that do not receive CDBG funds directly from HUD

Apply only through chief elected official
- Must be authorized to obligate the City or Town

Community-Wide Needs Score – 35 points

Mass. CDBG calculates score from a set of criteria - population demographics, economic conditions, the community's fiscal condition and community development indicators

- see One Year Plan for further explanation

Mass CDBG Program Components

Community Development Fund I

$15,535,615 available

Community-wide needs score =/>25 pts

Single and joint applicants

Required to target

Community Development Fund II

$2,700,000 available

Community-wide needs score </=26 pts

CDF II communities may join with CDF I

Required to target

Mass CDBG Program Components

Mini-Entitlement Program

- $8,100,000 available
- Required to target
- Multiple activities
- Community Development Strategy

Grant Award Amounts
CDF I & CDF II

Category	Maximum Grant Award CDF I / CDF II
Single Community	$ 800,000 / $700,000
Single Community w/multiple targeted physical activities	$ 900,000 / $800,000
Two or Three Communities (regional)	$1,000,000 / $900,000
Four or more Communities (regional)	$1,100,000 / $1,000,000
	Minimum
All (except planning)	$ 100,000
Planning or design only	$ 10,000

Grant Award Amounts
Mini-Entitlement

- Maximum Award is $ 900,000

- 9 Communities designated for FY 2014

- Required to target all activities

Due dates CDF I & II and Mini-Entitlement Applications

- Applications for CDF I & CDF II and Mini-Entitlements due Friday, February 14, 2014 at 11:59:59 PM via Intelligrants

- 1 hard copy of application cover page, joint authorization page with *original* signatures of appropriate CEO due Friday, February 14, 2014 at DHCD by 5:00 pm or close of business – *No other documents*

On-line Application

Web-based application forms can be found at http://madhcd.intelligrants.com (will be available soon)

DHCD will post notice on the DHCD web site

New Users

Follow instructions for "New Users"

Contact Carl Monaco @ (617) 573 1418 for assistance in accessing the system

Questions concerning the application should be directed to program staff

Application Threshold
Community Development Strategy

- Discussed at public meeting at least 1 month prior to application due date
- Include Strategy in application – Unless already approved
- Must identify/describe geographic target area (s)
- Project/Program must be included in Strategy
- Reflects local priorities
- Up to 7 pages
- Evaluated for adequacy – see Action Plan pp 6 and 7

Application Threshold
Timely Expenditure

For previous Grantees:

- 100% of funds from 2011 or earlier

- 80% of funds from 2012

- Procedural clearances complete from 2013

Funds may be returned to meet these requirements

Component Selection – Project Packets

- Top of the Forms page
- 5 component selections – (project packets)
- 1 project per component
- Packet contains:

    Project description - See Application Guidance
    Threshold questions

    Competitive (scored) questions

    Budget

Threshold Questions

- Is the project eligible?

- Does the project meet a national objective?

- Is the project targeted?

- Is the project consistent with the Community Development Strategy?

- Is the project consistent with the Sustainable Development principles?

Threshold Questions - What's Eligible?

- Title I of Housing & Community Development Act of 1974, as amended
- Housing assistance
- Public facilities
- Architectural/Engineering Design*
- Infrastructure
- Planning
- Public social services

*Risk of repayment if project construction not complete within five (5) years

Project Threshold
National Objectives

1. Benefit to low- and moderate- income persons

    or

2. Prevention or elimination of slums and blight

    or

3. Urgent need

Project Threshold
National Objective (LMI)

Low and moderate income benefit

Five ways: depends upon the project

    1. Area-wide low/moderate income

    2. Housing activity

    3. Limited clientele – no micro-enterprise activities in
       CDF

    4. Job creation or retention – not in CDF

    5. Planning

Project Threshold
National Objective (LMI)

1. Area-wide low/moderate income (LMI)

- Service area must be 51% LMI households
- Primarily residential
- Survey no older than 3 years
- Copy of blank survey document
- Summary survey results
- Street by street data
- Parcel Map of Service Area including vacant land
- If vacant land, describe future use for 5-7 years
- Explain methodology for geographic boundaries
- Census Data

Project Threshold
National Objective (LMI)

2. Housing activity

Demonstrate that 51% of the units in a structure are LMI households

3. Limited clientele

a. groups presumed: elderly*, battered spouses, severely disabled adults, people with AIDS, abused children, homeless people, illiterate people, migrant workers

b. potential (LMI) beneficiaries have already been documented

c. can conclude that majority of users will be LMI

d. groups that can be documented to be LMI

Project Threshold
National Objective (LMI)

4. Job creation or retention

Most Economic Development activities no longer accepted under CDF

5. Planning

The planning project, if implemented, will meet a LMI National Objective

Project Threshold National Objective

Slums & Blight - Area-wide or Spot

- Area-wide basis

- Submitted *no later* than 30 days prior to application due date

- Once approved by DHCD in FY 2007 or later, an inventory / target area is valid for 10 years

- Spot blight - only health & safety issues can be addressed

To demonstrate area-wide slums and blight a community needs:

- A declaration and description of area or site by local official; Chapters 121 A and B
- At least 25% of properties experience one or more of conditions on page 11 of the guidance
- Map delineating target area/Written description
- Current parcel inventory of buildings/properties and infrastructure
- Appendix J - summary table
- Appendix K - DHCD's property and infrastructure rating sheet
- Proposed project will address conditions that contribute to the deterioration of the area

Slums & Blight – Spot basis

- Limited to addressing conditions detrimental to public health and welfare
- Provide description of site
- Must indicate/document serious health and safety concerns

Project Threshold
Nat'l Objective - Critical Need

- Also: urgent need

- Catastrophe, natural disaster

- Situation not known prior to 18 months of the application

- No other financial resources exist

- DHCD approval necessary before application is submitted

Threshold Questions

Targeted Activities

- All FY 2013 **a**pplications must propose activities that are targeted to a geographic area.

- Description of the target area(s) and how the boundaries were determined. Why does this geographic area constitute a target area in the community?

- May design housing rehab programs so that 20% of funds may be used for *emergencies* outside of the target area

Project Threshold:
Senior Centers

– Site control under the Board of Selectmen or Mayor

– Bid-ready plans and specifications

  - One set of plans as attachment in application

  - Letter from Arch/Eng attesting that complete set of specs is prepared and bid-ready

– All other financial resources, if necessary, in place at time of application

– Must request elderly low/mod income data from DHCD

Project Thresholds:
Architectural Barrier Removal

Completion and Submission copy of ADA Self-Evaluations Survey and Transition Plan

Programmatic removal of barriers must be explored before requesting CDBG funds – discuss in project description

ONLY relevant barrier removal work may be funded

Project Thresholds:
Bid-ready Plans and Specifications

Bid-Ready plans and specifications* required for public facilities and barrier removal projects with construction costs > $100k

Design development drawings required for those projects and playground/park projects with construction costs of > $25K but < $100k

Project Thresholds:
Public Social Services

Social Service only applications are not allowable for Mass CDBG

Social service projects may not exceed 20% of the total grant amount

DHCD's policy that 50% of funds must support economic security and self-sufficiency

Encouraged but not required for 2014

No more than 5 public services programs

Evaluation

Community Development Fund I

Community Wide Needs Score – 35 points

Project Packet – 65 points, plus 2 points if "regional"

Bonus Points – 10 points

Community Development Fund II

No Community Wide Needs Score

Project Packet – 65 points, plus 2 points if "regional"

Bonus Points – 10 points

Evaluation: Project Packets
65 points

Each project packet evaluated and scored on the following:
- Project Need (18)
- Community Involvement and Support (12)
- Project Feasibility (20)
- Project Impact (15)
  - CDF projects must meet 39 out of 65 points to be considered fundable (Except PSS)
  - Planning activity packets will be scored using Project Need and Project Impact only and must receive at least half the points for each
  - Public Service packets will be evaluated on information contained in the project description and will be treated as pass/fail – See application guidance

Project Need – 18 points

- Define need (s) to be addressed – Target Area

- Why is this project important?

- Provide/document evidence of the degree of severity of need/problem – narrative should relate to documentation

- Who is affected population and why presently not served or underserved?

- Identify/describe the project area/facility and why this facility or area is adversely affected

Community Involvement and Support – 12 points

- Process used to select project, how this was responsive to an expressed community need; Document outreach efforts

- Document involvement of beneficiaries/ community in planning and development

- Define process to maintain involvement of beneficiaries

Project Feasibility – 20 points

- Provide/document demand
- Status of design
- Site Control (n/a for HR)
- Describe/document other funds
- Describe/document ER/permits
- Identify/describe procurement
- Roles and responsibilities, internal controls
- Past accomplishments/Capacity
- Describe/identify milestones and timeframe

Project Impact – 15 points

- Impact on identified needs – Target Area

- Measurable improvements

- Direct and indirect outcomes

- Quantitative & Qualitative measures

Bonus Points – 10 points

Multiple Activity - 5 points
  ❖Describe relationship of activities

Non-CDBG funded projects – 5 points
  ❖Be sure to document properly

Helpful Hints (and reminders)

- Read the One Year Plan
- One packet per project
- Page Limit - 6 pages for scored responses/ 3 pages for planning and PSS project descriptions
- Income surveys can't be more than 3 years old
- Slum & Blight inventory guidance – don't create your own criteria
- Public Hearing – read instructions!
- No changes/additions will be accepted after the application deadline
- Barrier Removal - scope limited to barrier removal
- Bid-ready plans and specifications* for all public facilities and architectural barrier removal projects with construction costs over $100,000
- READ THE APPLICATION GUIDANCE!!

Additional Considerations

- Regional applicants must comply with all requirements as individual applicants
- Applicants with a CWN of 25 or 26 that are participating in a regional application must identify whether they are participating as a CDF I or CDF II applicant. Attach statement in miscellaneous attachments of forms page.
- Applications will not be considered "regional" if the only activity taking place in more than one of the communities is public social services
- No single community may receive more than $1M in CDF I, CDF II or Mini-Entitlement grant funds from FY 2014 awards
- No single community may receive more than $1.35 million over a 2-year period
- Follow guidance. Policy needs to be clear.

Attachments

- Attach documents where they belong
- Attach documents only where they belong
- Attached document names - NO SYMBOLS – Make sure names are consistent
- Appendix list if many attachments
- Hyper Links – Not recommended
- Review attachment requirements in Application Guidance

dhcd
Massachusetts

Deval Patrick, Governor
Greg Bialecki, Secretary
Aaron Gornstein, Undersecretary

DHCD
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www.mass.gov/dhcd/

Application (RFP) Training

CDF I, CDF II, EDF and ME
application types

Login Page

Login with your Username and Password.

Home Page

Select the **View Opportunities** button below to see what is available to your organization.

Select the **Open Inbox** button below to open your system message inbox

Select the **Open Tasks** button below to view your active tasks.

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SHOW HELP

Welcome AO
Authorized Official
Change Picture

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant

Hello AO, please choose an option below.

View Available Opportunities

You have **11** Opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

VIEW OPPORTUNITIES ← **1**

My Inbox

You have **12** new messages.
Select the **Open Inbox** button below to open your system message inbox.

OPEN INBOX ← **2**

My Tasks

You have **9** new tasks.
You have **1** tasks that are critical.
Select the **Open Tasks** button below to view your active tasks.

OPEN TASKS ← **3**

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Opportunities

To apply for an item listed below, select the **Apply Now** button below each description.

This page will give you a list of all potential applications available for your agency.

Clicking the **Apply Now** button will begin the application.

Agreement Page

Are you sure you want to create this item?

Clicking the "**I Agree**" or "**I Do Not Agree**" buttons will continue the process of starting/ending the application.

Request for Proposal Menu

1. Select the **View Forms** button below to view, edit, and complete forms.

2. Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

3. Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

4. Select the **View Related Items** button below to view see related items such as claims, messages, etc.

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Request For Proposal Menu

Please select from an option below. For detailed instruction about each option, select the **SHOW HELP** button.

Document Information: CDF I-2010-Holbrook-00016

Info	Document Type	Organization	Role	Current Status	Date Due
	Request For Proposal	Town of Holbrook	Authorized Official	Application In Process	1/15/2011 11:00:00 AM

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS] ← 1

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS] ← 2

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RFP Form Menu

This list page gives you an overview of available forms for each RFP.

After saving a form without any errors this page will have a paper and pencil icon.

If the form is saved with an error there will be a stop sign icon on this page.

Example:

Anti-Displacement & Relocation Assistance Certification

Public Hearing Documentation

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Forms

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Program Components				
	Program Component Selection		AO Holbrook2 9/17/2010 10:48:17 AM	AO Holbrook2 9/17/2010 11:36:02 AM
General Information				
	Cover Page		AO Holbrook2 9/17/2010 11:33:52 AM	
	Joint Application Authorization		AO Holbrook2 9/17/2010 11:34:30 AM	
	Timely Expenditure Threshold		AO Holbrook2 9/17/2010 11:34:53 AM	
	Community Development Strategy		AO Holbrook2 9/17/2010 11:35:11 AM	
Construction Activities				
	Construction Packet		AO Holbrook2 9/17/2010 10:48:55 AM	
Public Services Activities				
	Public Service Packet		AO Holbrook2 9/17/2010 11:37:06 AM	AO Holbrook2 9/17/2010 11:39:43 AM
Rehabilitation Activities				
	Rehabilitation Packet		AO Holbrook2 9/17/2010 1:32:05 PM	
Bonus Points				
	Request for Bonus Points		AO Holbrook2 9/17/2010 11:48:28 AM	
	Additional Attachments		AO Holbrook2 9/17/2010 11:48:48 AM	
Plans				
	Anti-Displacement and Relocation Assistance Plan		AO Holbrook2 9/17/2010 11:50:25 AM	
	Citizen Participation Plan		AO Holbrook2 9/17/2010 11:51:58 AM	
	Grant Management Uploads		AO Holbrook2 9/17/2010 11:52:13 AM	
	Program Income Plan		AO Holbrook2 9/17/2010 11:52:26 AM	
	Anti-Speculation and Recapture Plan		AO Holbrook2 9/17/2010 11:52:41 AM	
Certifications				
	CEO Certifications		AO Holbrook2 9/17/2010 11:53:29 AM	
	Chief Financial Officer Certification		AO Holbrook2 9/17/2010 11:53:54 AM	
	Displacement of Non-CDBG Funds Certification		AO Holbrook2 9/17/2010 11:56:26 AM	
	Anti-Displacement & Relocation Assistance Certification		AO Holbrook2 9/17/2010 1:00:56 PM	
	Civil Rights Certification		AO Holbrook2 9/17/2010 1:04:47 PM	
	Program Income Certification Instructions		AO Holbrook2 9/17/2010 1:05:02 PM	
	Public Hearing Documentation		AO Holbrook2 9/17/2010 1:06:57 PM	AO Holbrook2 9/17/2010 1:07:12 PM
	Program Income Certification Form		AO Holbrook2 9/17/2010 1:12:00 PM	AO Holbrook2 9/17/2010 1:14:23 PM
	Program Income Cert Form Page 2		AO Holbrook2 9/17/2010 1:16:25 PM	AO Holbrook2 9/17/2010 1:17:26 PM
	Implementation and Cash Flow Plan		AO Holbrook2 9/17/2010 1:18:57 PM	
	Implementation and Cash Flow Plan P2		AO Holbrook2 9/17/2010 1:20:21 PM	
	Implementation and Cash Flow Plan P3		AO Holbrook2 9/17/2010 1:21:19 PM	
	Implementation and Cash Flow Plan P4		AO Holbrook2 9/17/2010 1:23:58 PM	
	Outcome Performance Summary Chart: Instructions		AO Holbrook2 9/17/2010 1:24:52 PM	
	Outcome Performance Summary Chart		AO Holbrook2 9/17/2010 1:25:27 PM	
	Program Contingency Plan		AO Holbrook2 9/17/2010 1:28:38 PM	
Miscellaneous				
	Other Attachments		AO Holbrook2 9/17/2010 11:53:07 AM	
Application Budget				
	Part A - Administrative Costs - Personnel, Fringe Benefits		AO Holbrook2 9/17/2010 10:46:40 AM	
	Part B - Administrative Costs Indirect & Non-Personnel Costs		AO Holbrook2 9/17/2010 10:47:12 AM	
	Budget Summary		AO Holbrook2 9/17/2010 10:47:23 AM	

Component Selection

Packet Pages

After clicking on an individual packet page (i.e.…Construction Packet, Public Service Packet, Rehabilitation Packet, etc…) The Related Pages will become available at the bottom, In the Related Pages section of the page.

Related Pages

Status	Page Name	Note	Created By	Last Modified By
📝	Construction Packet		AO Holbrook2 9/17/2010 10:48:55 AM	AO Holbrook2 9/21/2010 10:12:29 AM
📝	National Objective (Construction)		AO Holbrook2 9/17/2010 10:49:28 AM	AO Holbrook2 9/17/2010 10:49:56 AM
📝	Threshold Requirements (Construction)		AO Holbrook2 9/17/2010 10:50:30 AM	
📝	Additional Construction Project Thresholds (Construction)		AO Holbrook2 9/17/2010 10:51:16 AM	
📝	Project Description (Construction)		AO Holbrook2 9/17/2010 11:03:52 AM	
📝	Project Budget Information (Construction)		AO Holbrook2 9/17/2010 11:04:24 AM	
📝	Project Budget: Architectural Barrier Removal (Construction)		AO Holbrook2 9/17/2010 11:05:47 AM	
📝	Project Budget: Demolition (Construction)		AO Holbrook2 9/17/2010 11:07:10 AM	
📝	Project Budget: Infrastructure (Construction)		AO Holbrook2 9/17/2010 11:13:50 AM	AO Holbrook2 9/17/2010 11:16:25 AM
📝	Project Budget: Neighborhood Facilities (Construction)		AO Holbrook2 9/17/2010 11:18:46 AM	AO Holbrook2 9/17/2010 11:19:36 AM
📝	Project Budget: Playgrounds/Parks (Construction)		AO Holbrook2 9/17/2010 11:23:37 AM	AO Holbrook2 9/17/2010 11:24:55 AM
📝	Program Delivery - Part A - Personnel, Fringe Benefits (Construction)		AO Holbrook2 9/17/2010 10:53:33 AM	
📝	Program Delivery - Part B - Indirect & Non-Personnel Costs (Construction)		AO Holbrook2 9/17/2010 10:54:46 AM	
📝	Competitive Questions (Construction)		AO Holbrook2 9/17/2010 11:25:39 AM	
📝	Competitive Question Attachments (Construction)		AO Holbrook2 9/17/2010 11:25:56 AM	

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Change the Status

To change the status of the document, click on the View Status Options button.

Status Options

On the Request for Proposal Menu – Status Options page, you have a list of all status' possible to change at the moment.

To change the status, click the "Apply Status" button below the desired outcome.

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Cover Page

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Agreement

Please make a selection below to continue.

I agree that the information provided in this Application is accurate.

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0 of 2000

I AGREE   I DO NOT AGREE

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Post Submission

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(The save button will be visible but, grayed out.)

You can view a printer friendly version of the form and add notes.

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Details

Created By: Holbrook2, AO on 9/17/2010 11:33:52 AM

Modified By: Holbrook2, AO on 9/21/2010 10:56:53 AM

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COVER PAGE